

NAME

CONTACT INFORMATION

OBJECTIVE

A position in the financial industry offering me personal challenges and opportunities for professional growth.

QUALIFICATIONS

- Results-oriented professional with 20 years accounting and financial management experience.
- High level of responsibility for analysis, modeling, and auditing.
- Analytical, organized, and flexible with strong follow-through skills.
- Strong problem-solving and efficiency skills; able to streamline operations and utilize a wide variety of resources to drive corporate change.
- Quality work ethic; works well both independently and in groups/teams.
- Windows; MS Pro Office Suite and proprietary software experience, with high level of proficiency in MS Word and Excel
- 10-key by touch and typing speed of 30 WPM

EXPERIENCE

Franklin Templeton Investments, Sacramento, CA

1990 – Present

Treasury Analyst – Treasury Accounting Control Dept.

(2000 – Present)

- As a member of a new team, required to determine best practices and create procedures. Extensive analysis required, as well as the ability to self-motivate and work independently
- Tracked and processed escheatment due diligence letters and reported abandoned properties in compliance with state laws
- Conducted collection and follow-up with state offices for properties escheated in error
- Submitted reclaim requests on behalf of clients and follow up with state offices, ensuring timely reimbursements
- Provided external financiers with timely and accurate information pertaining to funds, financed as expressed in service agreements

Research/Adjustments Specialist

(1992 – 2000)

- High level of attention to detail, organization and ability to work under pressure required.
- Trained new and existing personnel with an emphasis on coaching.
- Integral team member for departmental expansion.
- Performed complex adjustments on customer accounts, including calculating dividends and interest.

Data Preparation Specialist

(1990 – 1992)

- Extensive data entry with a high level of attention to detail required.
- Opened new accounts, balanced checks, and handled reconciliations.

EDUCATION/TRAINING

Financial / Accounting coursework – American River College

Financial /Accounting coursework – University Of The South Pacific, Fiji

Financial /Accounting coursework – Darling Downs Institute Of Advanced Education , Queensland, Australia

AWARDS

Received numerous Employee of the Month and “Spot” awards, accolades, and bonuses for exceptional performance.

REFERENCES AVAILABLE UPON REQUEST